



MESSAGING BUILDER WORKBOOK

Client Discovery & Messaging
Development Guide



Outbound Strategy Framework
for **AI-Powered Prospecting**

BDR.ai Messaging Builder Workbook

Contents

[Part 1 — Business Context 6](#)

[Part 1B — Think About a Real Client 10](#)

[Part 2 — Ideal Client Profile\(s\) 15](#)

Client Discovery & Messaging Development Guide

Welcome!

This workbook helps build the strategic foundation for successful outbound messaging campaigns.

BDR.ai provides the **platform, campaign automation, and messaging framework**.

You provide the **expertise about your industry, your clients, and the problems they face**.

Together, this allows us to create outreach campaigns that start **meaningful conversations with the right people**.

How Successful Outbound Messaging Actually Works

Most professionals receive dozens of sales messages every week.

Most of those messages fail because they try to **sell too quickly**.

Successful outreach focuses on **starting conversations**, not pitching immediately.

We use a structure called the **Conversation Ladder**.

The Conversation Ladder

- 1 — Warm introduction or connection request
- 2 — GIVE value
- 3 — GIVE value again
- 4 — ASK for a conversation
- 5 — Follow up
- 6 — Soft call invite
- 7 — Polite pause

Each step builds familiarity and trust.

The BDR Outbound Success Framework

Outbound success happens when **five elements work together**.

1 — The Right Audience

Success begins with targeting the correct **Ideal Client Profile (ICP)**.

This includes:

- industry
 - company size
 - leadership role
 - geography
 - business model
-

2 — A Credible Profile

Prospects often review your LinkedIn profile before responding.

Your profile should clearly communicate:

- who you help
 - the problems you solve
 - your credibility
 - what step to take next
-

3 — Value-Driven Messaging

Successful outreach provides **value before asking for anything**.

Examples of value:

- industry insights
 - articles
 - podcasts
 - videos
 - case studies

4 — Consistent Activity

Successful outbound campaigns require **small daily engagement**.

Plan to spend about **10–15 minutes per day** reviewing and responding to activity.

5 — Real Conversations

The goal of outbound messaging is to create:

- professional relationships
- meaningful conversations
- opportunities to help the right people

Over time, those conversations become revenue opportunities.

Client Collaboration Agreement

Successful outbound campaigns require collaboration.

BDR.ai Provides

- outbound automation platform
 - campaign structure
 - onboarding guidance
 - messaging framework
 - best practices
-

Clients Provide

- knowledge of their industry
 - understanding of their clients
 - messaging insights
 - valuable resources to share
 - daily engagement with prospects
-

Messaging Responsibility

BDR provides messaging guidance and structure.

However, the final messaging must reflect **your expertise and understanding of your audience**.

Daily Engagement Expectation

Plan to spend **10–15 minutes per day** reviewing activity and responding to messages.

Part 1 — Business Context

Before anyone can write strong outreach messaging, they must first be able to explain their business in a way that is:

- clear
- simple
- specific
- relevant to the people they want to reach

Most business owners are too close to what they do. They often describe their business using:

- industry jargon
- broad language
- internal terminology
- vague phrases like “help businesses grow”

The problem is that vague business descriptions create vague messaging.

This section helps you clearly define:

- what your company does
- who it helps
- what business outcome it creates
- what you want outbound outreach to accomplish

This is the foundation for the rest of the workbook.

1. Company name

Your Answer:

2. Website(s)

Your Answer:

3. LinkedIn profile

Your Answer:

4. Your role

Your Answer:

5. In simple terms, what does your company do?

Why This Question Matters

This is one of the most important questions in the workbook.

If you cannot explain what your company does in simple, clear language, your outreach messaging will likely be:

- too broad
- too confusing
- too salesy
- too focused on services instead of outcomes

The goal is **not** to sound impressive.

The goal is to sound **clear and relevant**.

Think about how you would explain your business to:

- a smart stranger

- a potential client
- someone you met at a networking event

A strong answer usually includes:

1. **Who you help**
 2. **What problem you help solve**
 3. **What outcome you help create**
-

Weak Examples

“We help businesses grow.”

“We provide innovative consulting solutions.”

“We offer leadership development and sales enablement services.”

These are too vague. They do not make it clear:

- who the company helps
 - what problem it solves
 - why someone should care
-

Stronger Examples

“We help B2B companies build predictable sales pipeline using LinkedIn outreach.”

“We help founders generate more qualified conversations without relying only on referrals.”

“We help leadership teams improve accountability and execution so they can grow more consistently.”

“We help consultants and service firms start better sales conversations with ideal clients.”

Simple Formula

Use this structure if you get stuck:

We help [type of client] solve [problem] so they can [outcome].

Examples Using the Formula

We help B2B founders solve inconsistent pipeline so they can grow revenue more predictably.

We help sales leaders solve low prospect engagement so they can create more qualified conversations.

We help business owners solve referral dependence so they can generate more consistent opportunities.

Your answer:

6. What are you hoping to accomplish with outbound outreach?

This question clarifies the purpose of the campaign.

Not every outbound campaign has the same goal.

Some clients want to:

- start conversations
- book discovery calls
- fill webinars
- generate partnerships
- reconnect with their market
- test messaging
- validate an offer

If this goal is unclear, the outreach will lack direction.

Think about what success would look like in the next 30–90 days.

Common Outbound Goals

Examples:

- book discovery calls
- start conversations with ideal prospects
- promote a webinar or event
- generate partnerships

- reconnect with warm contacts
 - validate a new offer
 - create more visibility in a target market
 - generate qualified opportunities
-

Weak Answers

“Get more leads.”

“Grow the business.”

These are too broad.

Stronger Answers

“Start conversations with 20–30 manufacturing CEOs.”

“Book 10 discovery calls with founders in professional services firms.”

“Promote a webinar to HR leaders in the Denver area.”

“Reconnect with warm LinkedIn contacts and move them into conversation.”

Your answer:

Part 1B — Think About a Real Client

Many people struggle with abstract strategy questions because they are trying to think too broadly.

This section solves that problem.

Instead of thinking in theory, think about **a real client you have already helped**.

This helps uncover:

- the right ICP
- real problems
- real frustrations
- real outcomes

- real language prospects might use

This section is one of the most powerful parts of the workbook because it grounds your messaging in **real experience**, not guesswork.

If you ever feel stuck anywhere else in this workbook, come back to this section.

Think in Story Form

The easiest way to answer these questions is to think about a real client and ask:

- Who were they?
- What was happening before they got help?
- What were they frustrated by?
- What changed?
- Why did they trust you?

These answers often become the raw material for:

- pain points
 - messaging angles
 - conversation hooks
 - proof and credibility
 - value proposition
-

1. Describe the Client

What to Include

Try to describe:

- what kind of company they were
- their size
- their industry
- what role you worked with
- the core business situation

Weak Example

“A client in manufacturing.”

Too vague.

Stronger Example

“Manufacturing company with 75 employees that was struggling with inconsistent pipeline and relying too heavily on referrals.”

“Founder-led consulting firm generating good business through referrals but lacking a repeatable outbound strategy.”

“B2B services company with a small sales team trying to generate more qualified conversations on LinkedIn.”

What Problem Were They Experiencing?

Why This Matters

This helps identify the kind of problem that creates urgency.

Think about the problem that caused them to seek help.

Ask yourself:

- What wasn't working?
- What challenge pushed them to make a change?
- What was the real business issue underneath the surface?

Examples

“They relied almost entirely on referrals and didn't have a predictable way to generate new opportunities.”

“Their sales team wasn't starting enough quality conversations.”

“They were posting on LinkedIn but not converting activity into business conversations.”

“They were growing, but their sales process was becoming inconsistent.”

What Frustrated Them Most?

Why This Matters

Business problems often have an emotional component.

This question gets closer to the real frustration behind the business issue.

Ask yourself:

- What was bothering them most?
- What felt stressful or unsustainable?
- What were they tired of dealing with?

This helps generate stronger messaging later because people respond to problems they **feel**, not just problems they logically understand.

Examples

“The CEO felt growth was too unpredictable.”

“They were frustrated that outbound efforts weren’t leading to real conversations.”

“They felt stuck because referrals were slowing down.”

“They were tired of trying different tactics without seeing clear results.”

What Changed After Working With You?

Why This Matters

This question helps you identify results and outcomes.

Think about what improved after they worked with you.

This does not need to be dramatic or overly polished. Focus on real changes.

Examples

“They began generating more consistent sales conversations.”

“They created a clearer outbound strategy and started booking meetings.”

“They stopped relying only on referrals and created a more predictable lead flow.”

“They improved the quality of their outreach and started getting more responses.”

Why Did They Choose You?

Why This Matters

This question helps uncover:

- what makes your approach different
- what people value about your style
- why prospects trust you

Many clients overlook this question, but it often reveals their strongest positioning language.

Examples

“Our approach focused on starting conversations rather than aggressive sales messaging.”

“They liked that we made the process simple and strategic.”

“They trusted our experience and appreciated that we understood their industry.”

“They chose us because our approach felt more human and practical than traditional sales tactics.”

Now, it's your turn!

1. Describe your client

Example: “Manufacturing company with 75 employees struggling with inconsistent pipeline.”

Your answer:

2. What problem were they experiencing?

Example: “They relied almost entirely on referrals.”

Your answer:

3. What frustrated them most?

Example: “The CEO felt growth was unpredictable.”

Your answer:

4. What changed after working with you?

Example: “They began generating consistent sales conversations.”

Your answer:

5. Why did they choose you?

Example: “Our approach focused on starting conversations rather than aggressive sales messaging.”

Your answer:

Part 2 — Ideal Client Profile(s)

Think about what your ICP does, groups they are a part of, how they use LinkedIn

Your Ideal Client Profile, or ICP, defines **who your outreach is for**.

If your ICP is too broad, the messaging becomes generic.

If your ICP is too narrow or unclear, the campaign becomes hard to scale.

Strong outbound messaging works best when you clearly understand:

- who the ideal prospect is
- what kind of business they are in
- what role they play
- what world they live in
- who is not a fit

The purpose of this section is to help you define the audience your messaging should be written for.

Think Beyond Basic Demographics

A strong ICP is more than just:

- industry
- company size
- title

It also helps to think about:

- what they care about
- what groups they belong to
- how they use LinkedIn
- what pressures they face
- what decisions they influence

The goal is to describe **the type of person and company most likely to benefit from what you do.**

1. Primary Industry

Why This Matters

Different industries care about different problems.

Your outreach becomes stronger when the messaging clearly reflects the prospect's world.

Examples

Manufacturing

Health & Wellness

Professional Services

Sales Consulting

Retail

Technology

Financial Services

Real Estate

Coaching
HR / Recruiting

Stronger Example

Instead of just “Tech,” you might write:

“B2B SaaS companies selling to mid-market businesses.”

Instead of just “Healthcare,” you might write:

“Private practice healthcare groups and healthcare service providers.”

2. Company Size

Why This Matters

A company with 5 employees and a company with 5,000 employees have very different needs, urgency, and buying behavior.

Think about the company size where your solution is most relevant.

Examples

10–50 employees
20–200 employees
50–500 employees

Tip

Be realistic. If your offer is best for growing small-to-midsize firms, say that clearly.

3. Revenue Range

Why This Matters

Revenue helps define the kind of business maturity and buying power your ideal client likely has.

This can help sharpen the ICP when employee count alone is not enough.

Examples

\$1M–\$5M
\$5M–\$50M
\$10M–\$100M

4. Geography

Why This Matters

Geography affects relevance, market context, language, and who the campaign should target.

Think about where your best-fit clients are located.

Examples

United States

North America

Colorado

Greater Denver Area

Southeast U.S.

Remote / nationwide

5. Primary Decision-Maker Titles

Why This Matters

This defines who the messaging is primarily written for.

Ask yourself:

- Who usually feels the pain most?
- Who has authority to act?
- Who is most likely to respond to outreach?

Examples

CEO

Founder

President

VP Sales

Sales Director

Head of Growth

Managing Partner
Business Owner

Tip

List the titles most likely to actually care about the problem you solve, not just titles that sound senior.

6. Who Is NOT a Good Fit?

Why This Matters

This is one of the most overlooked parts of ICP definition.

Strong campaigns are not just about knowing who to include. They also require knowing who to exclude.

This helps avoid:

- bad-fit prospects
- weak conversations
- irrelevant messaging
- wasted campaign volume

Industries to Avoid

Examples

Retail
Hospitality
Nonprofits
Early-stage startups
Government organizations

Titles to Avoid

Examples

Recruiters
Marketing Assistants

Administrative Roles
Entry-level employees
Students

Optional Thinking Prompt

If someone from this audience replied and booked time with you, would you be excited to talk with them?

If the answer is no, they are probably not part of your ICP.

Now build your ICP:

1. Primary industry

Examples: Manufacturing, Health & Wellness, Sales, Retail, Tech

Your answer:

2. Company size

Example: 20–200 employees

Your answer:

3. Revenue range

Example: \$5M–\$50M

Your answer:

4. Geography

Example: United States, North America, Colorado, Greater Denver Area

Your answer:

5. Primary decision-maker titles

Example: CEO, Founder, VP Sales

Your answer:

6. Who is NOT a good fit?

Industries to avoid:

Titles to avoid: