

Outreach OS — Team Onboarding Guide

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For: Outreach Team Members

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Why This Matters

Every DM you send represents the Funnel Futurist brand. One bad message can burn a prospect permanently. One great conversation can turn into a perfect client.

We built Outreach OS because we're not an agency that sprays and prays. We have a system — tested frameworks, real data, and a conversion mechanism (the Light Audit) that no competitor can replicate. But the system only works if the people running it understand WHY it works, not just WHAT to do.

This onboarding process exists to make sure every person who touches a prospect has earned the right to do so.

The Ground Rules

1. No copy-paste. Ever. Every DM you send must be typed by hand. The system literally blocks paste. This isn't a punishment — it's how you build persuasion muscle. After 500 typed DMs, you'll write better copy than any template could give you.

2. Research before you reach out. If you can't name something specific about their business, you haven't looked hard enough. Generic outreach has a 71% failure rate. We don't do generic.

3. The Light Audit is our edge. Every conversation you have should naturally move toward offering a free Blind Spot Brief on their business. It's not a sales pitch — it's proof we can help. The audit does the selling for us.

4. Respect the platform limits. LinkedIn: 15-20 connections/day. Instagram: 20-30 DMs/day. Facebook: 20-30 friend requests/day. Break these and your account gets flagged. We can't help prospects from a banned account.

5. Energy over tactics. Read your message back before you send it. Does it sound like a confident friend offering help? Or a desperate salesperson chasing a commission? If it's the second one, delete it and try again.

6. Quality over volume. 10 great conversations beat 100 spray-and-pray DMs. Every time.

Your Certification Path

Step	What	Time
1. Watch & Read	Watch the walkthrough video + read the Core SOP doc	15 min
2-7. Learn the Frameworks	6 short lessons covering everything from opening psychology to objection handling	12 min
8. Pass the Quiz	7 questions, 70% to pass. Proves you understand the theory.	5 min
9-13. Practice Sessions	5 AI prospect role-plays. The AI plays the prospect, you practice your DM skills. Scored on 6 dimensions.	50-75 min
14. Certified	Pass all 5 sessions → you're certified. Live outreach access unlocked.	—

Total time: ~1.5-2 hours spread over a few days.

You can retake the quiz and redo practice sessions as many times as needed. Speed doesn't matter — quality does.

What You'll Learn

Opening Psychology — How to write an opener that earns a reply, not an eye-roll. Specific observations, restrained confidence, no generic compliments.

Multi-Threading (80/20 Rule) — 80% personal conversation, 20% business. People buy from people they like. If every message is about business, you're running an interrogation.

Frame Control — The person with the frame controls the conversation. "If and how" framing. Never chase. Outcome-independent energy.

The Light Audit — Our secret weapon. A free analysis of their business that proves we're not just talking — we actually looked. The password-tease play is how we deploy it.

Platform Safety — The exact daily limits per platform so you don't get banned. Non-negotiable.

Objection Handling — The Money-Confidence-Fear cycle. How to turn "I'm not interested" into "tell me more."

What You're Building Toward

You're not just sending DMs. You're the front line of a pipeline that includes:

- **AI-powered prospect research** — We use Prospeo to find and verify ideal prospects before you ever send a message
- **The Blind Spot Brief** — A branded audit page with their name in the URL that shows them exactly where their business is leaking revenue
- **AI DM Coach** — Available right inside the app. Paste your conversation, get framework-aligned suggestions in real time
- **Automated reply routing** — When prospects reply to cold emails, our system classifies the response and routes it to the right person
- **Full pipeline tracking** — Every conversation, every stage, every score is tracked. Your performance compounds over time.

This isn't a spreadsheet and a prayer. This is a system built to scale — and you're the human layer that makes it personal.

Getting Started

1. Go to **outreach.funnelfuturist.com**
2. Watch the welcome video
3. Click "Let me sign in" and enter your team email
4. Check your inbox for the magic link (from noreply@updates.funnelfuturist.com)
5. Click the link → you're in
6. Follow the onboarding steps — lessons, quiz, practice
7. Get certified. Start reaching out.

Questions? Ask our AI > or Keziah (process owner) or John directly.

Let's build something worth talking about.
