

Cold Outreach & Pitching for Freelancers — Workbook

This workbook turns the course into a live outbound system you can run this week. Work through one section per module: define your target, write your messages, build your sending machine, and track your way from reply to paid client. Fill in every field and template, because a half-built outreach system books no calls.

Targeting: Who You Pitch and Why It Decides Everything

Lock in a sharp ideal client profile and build a researched list of real prospects before you write anything.

Worksheet: Your Ideal Client Profile in One Sentence

Complete each filter, then combine them into a single ICP sentence you will reuse for sourcing and for the opening line of every cold message.

Industry or vertical

Company size (headcount or revenue band)

Trigger event that signals budget or pain

Decision-maker job title who owns the budget

The specific, costly pain I remove

My full ICP sentence (all five filters combined)

Exercise: Run the Two-Minute Research Pass on Five Prospects

Pick five companies that match your ICP. For each, spend no more than two minutes finding one true, specific detail you could reference in a cold opener. Then answer the prompts below.

- What is the single research detail you captured for each prospect (a post, launch, hire, or visible gap)?
 - Which detail would make the strongest, most specific cold opener and why?
 - Were you tempted to over-research? How will you cap research time at scale?
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Checklist: Prospect List Readiness Checklist

- I have written my ICP as a single sentence using all five filters
- I have chosen my sourcing tools (LinkedIn Sales Navigator, Apollo, Hunter, or Clay)
- I have built a list of at least 25 named decision-makers that match my ICP
- Each prospect has a verified work email or a reachable LinkedIn or social profile
- Each prospect row includes one specific research detail for the opener
- I have chosen a primary channel and one supporting channel for these prospects

The Message: Cold Copy That Earns a Reply

Write reply-worthy cold messages using proven frameworks and honest, scalable personalisation.

Worksheet: Draft Your AIDA and PAS Cold Messages

Write one complete cold message using AIDA and one using PAS, aimed at your ICP. Keep each under 125 words and fill in every component below.

AIDA - Attention (specific opener line)

AIDA - Interest (relevant insight or number)

AIDA - Desire (better outcome plus proof or past result)

AIDA - Action (one small ask)

PAS - Problem (the specific issue they face)

PAS - Agitate (the honest cost of leaving it unsolved)

PAS - Solution (your service as the fix plus next step)

Exercise: Rewrite a Weak Opener Into a Strong One

Start from the weak template opener My name is X and I offer Y services. Rewrite it three times, each referencing a different real research detail from one of your prospects.

- What specific detail did each rewritten opener reference?

- Which version sounds most like a human and least like a template, and why?

- Does any version still slip into talking about you before them? Fix it.

Checklist: Message Quality Checklist

- My message is between 50 and 125 words and readable in under fifteen seconds
- It opens with one true, specific line about the prospect, not about me
- It makes one clear offer, never a menu of services
- It ends with a single easy-to-answer question
- It contains no attachments and no links in the first touch
- I read it aloud and it sounds like a person wrote it
- No merge field such as Hi FIRSTNAME could ever leak through

The System: Sequences, Tools, and Deliverability

Build the multi-touch follow-up sequence and the sending infrastructure that make outreach reliable and inbox-safe.

Worksheet: Design Your Four-Touch Sequence

Write the content and timing of each touch in your sequence. Every follow-up must add something new, never just bump the thread.

Day 1 - Initial pitch (AIDA or PAS)

Day 3 - Bump with a new angle or proof point

Day 7 - Value-add touch (idea or resource, no ask)

Day 12 - Polite breakup message

Primary channel and supporting channel for this sequence

The rule that stops the sequence (reply received, positive or negative)

Worksheet: Plan Your Sending Infrastructure

Specify the exact setup you will use to send safely at volume, including domains, inboxes, and daily limits. Secondary sending domain(s)

Number of inboxes and daily send limit per inbox

Sequencing tool (Instantly, Smartlead, or Lemlist)

Lead sourcing and verification tool

Booking tool (Calendly or Cal.com)

Estimated total monthly tool cost

Checklist: Deliverability Setup Checklist

- I am sending from a secondary domain, not my main business email
- SPF, DKIM, and DMARC are configured on every sending domain
- Each new inbox was warmed up for two to three weeks before cold sending
- Every email address is verified and my bounce rate is under 3 percent
- My templates avoid spam-trigger words like free, guarantee, and act now
- I stay within safe limits: about 30 to 50 emails per inbox and under 20 LinkedIn requests per day
- I monitor reply and bounce rates weekly and pause if deliverability drops

Conversion: From Reply to Booked Call to Client

Turn replies into booked discovery calls and clients, then track the funnel so it improves every week.

Worksheet: Your Reply and Objection Playbook

Write your default response for each reply type and objection so you never freeze when a message lands.

Keep each response calm and pointed toward a short call.

Positive reply response (propose a call, send booking link)

Neutral or question response (answer briefly, pivot to call)

Negative reply response (thank, leave door open, ask to follow up later)

Objection - We have no budget

Objection - We already have someone

Objection - Send me more info

Objection - How much do you charge

Exercise: Build and Rehearse Your Discovery-Call Script

Using the six-step discovery structure from the course, write your questions and rehearse the call out loud once before your next real conversation.

- What are your three to five tailored discovery questions about the prospect's problem?

- How will you confirm budget range and decision process before pitching?

- What is your plan to let the prospect talk for most of the call?

- What concrete next step will you agree at the end of every call?

Worksheet: Calculate Your Funnel Metrics

Using one week of real outreach numbers, compute each metric and identify the single weakest step to fix next week.

Messages sent

Total replies and reply rate

Positive replies and positive reply rate

Calls booked and booking rate

Clients won and close rate

The single weakest step to fix next week

Checklist: Weekly Outreach Review Checklist

- I logged every prospect and every touch in my tracker this week
- I calculated reply rate, positive reply rate, booking rate, and close rate
- I identified the single weakest step in my funnel
- I changed only one variable to test for next week
- I responded to every reply within a few business hours
- I sent a booking link immediately to every positive reply
- I scheduled my next Friday review to repeat the loop

Your Action Plan

1. Write your ideal client profile as a single sentence using all five filters
2. Build a researched list of at least 25 to 100 named prospects with verified contact details and one detail each
3. Choose your primary and supporting channels and set up a secondary sending domain with warmed inboxes
4. Write your AIDA and PAS cold messages and your four-touch follow-up sequence
5. Configure deliverability: SPF, DKIM, DMARC, email verification, and safe daily send limits
6. Send your first batch of 10 to 20 personalised messages and log every one in your tracker
7. Respond to replies within a few hours and send a booking link to every positive reply
8. Run discovery calls using the six-step structure and agree a concrete next step each time
9. Calculate your funnel metrics at the end of week one
10. Hold a Friday review, fix the single weakest step, and repeat the loop every week

