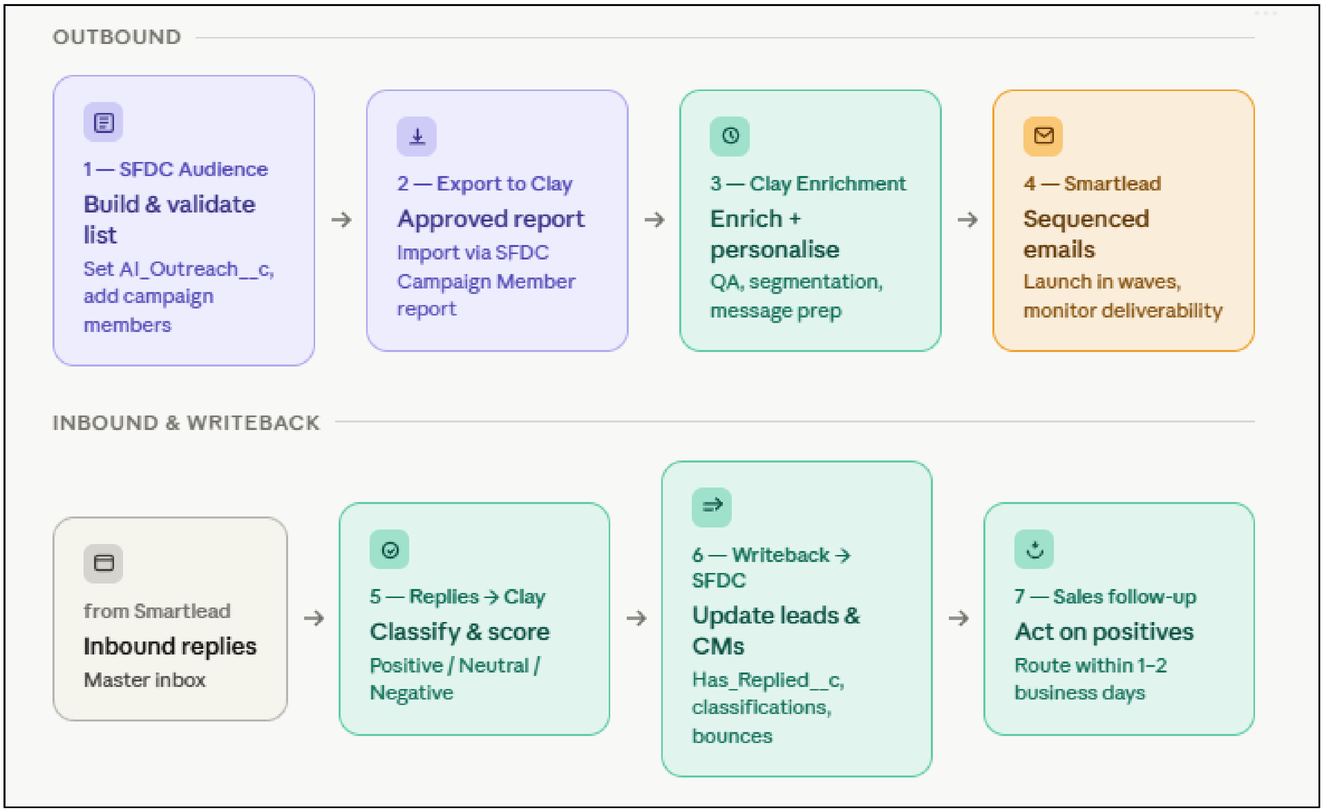
Stage-by-stage guide

The full operational workflow for running an AI Outreach campaign — from lead selection in Salesforce through enrichment and sending in Clay and Smartlead, all the way to reply handling and data writeback. This page replaces tribal knowledge and is the single source of truth for teams, auditors, and security reviews.

High Level Flow

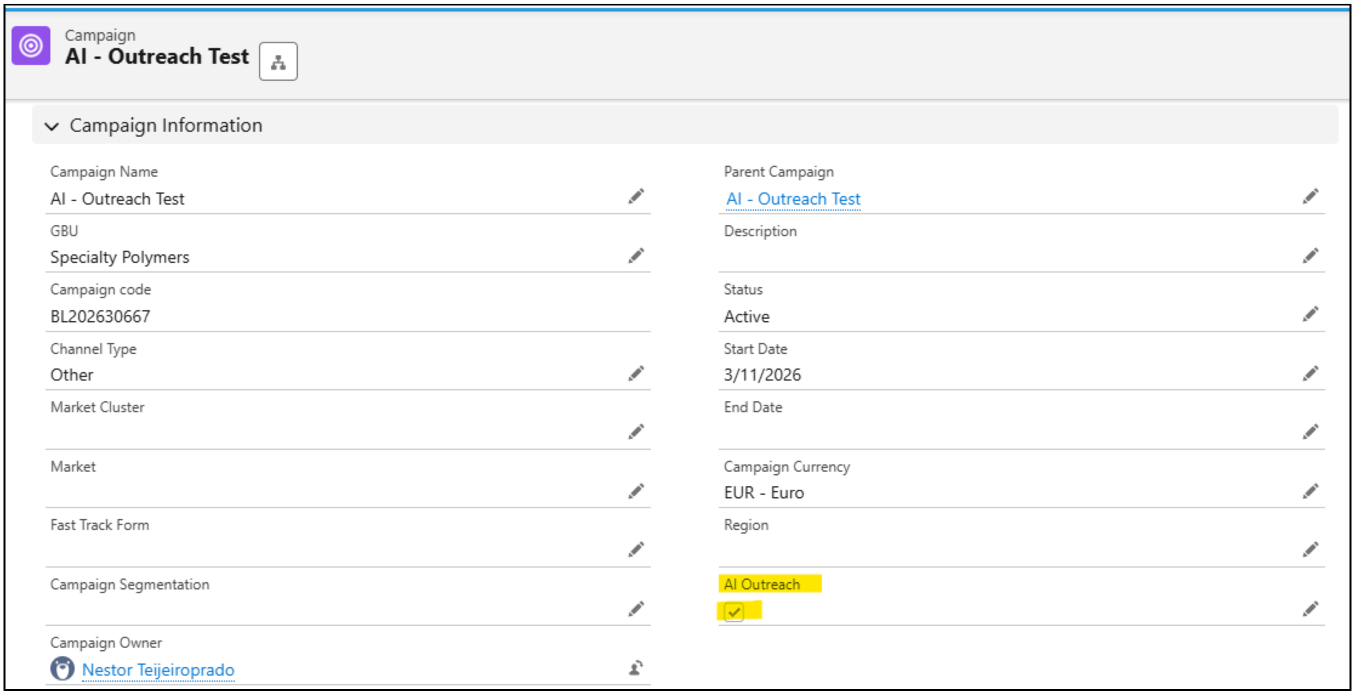
The campaign lifecycle runs in two directions — outbound (steps 1–4) and inbound/writeback (steps 5–7). Every step is connected through the native Clay Salesforce connector, eliminating manual CSV transfers.



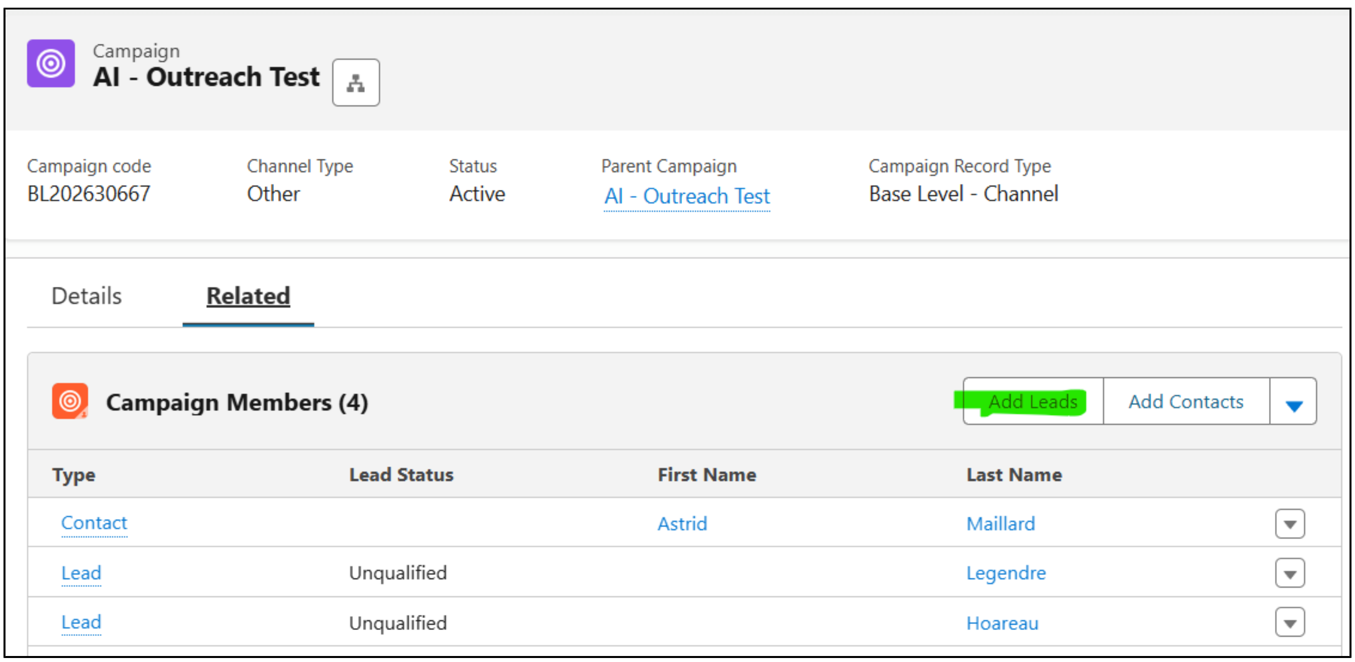
Stage 1 — Campaign brief and audience setup

MARCOM Ops creates or updates a Campaign with AI_Outreach__c = TRUE. Campaign Members are added using a list view or report filtered by Cold_Lead_Eligible__c = TRUE. All eligibility criteria must be validated before proceeding.

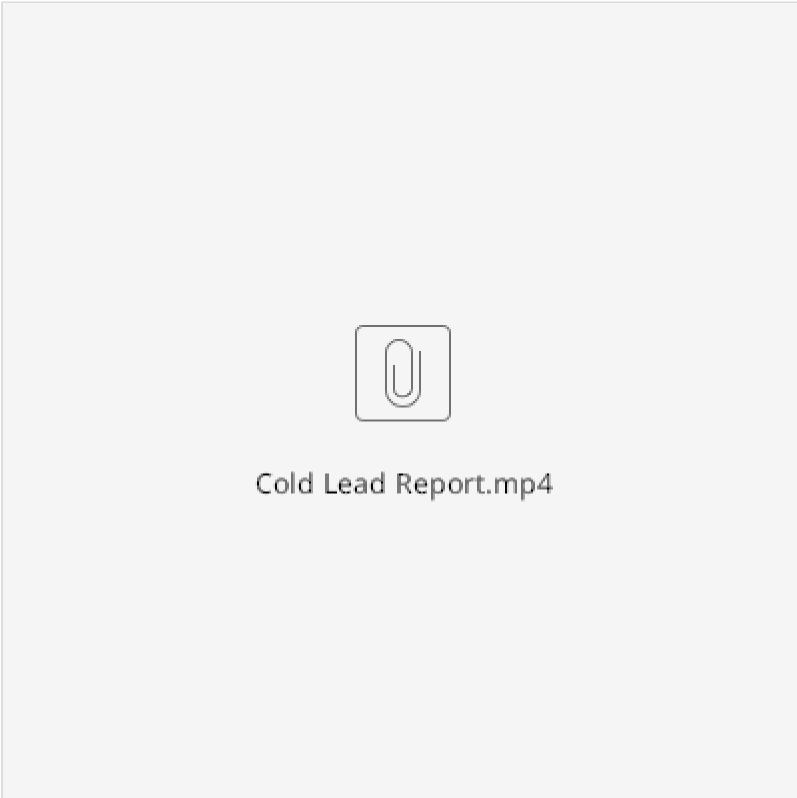
1. Navigate to Campaigns in Salesforce and click New or open an existing Campaign.
2. Set the field AI_Outreach__c to TRUE on the Campaign record.
3. Open the Campaign Members related list and click Add Members — Search.
4. Select the list view or report filtered by Cold_Lead_Eligible__c = TRUE. Or add members by other means.
5. Save the Campaign record. It is now ready for export.



Marking as an AI Outreach Campaign



Adding Campaign Members



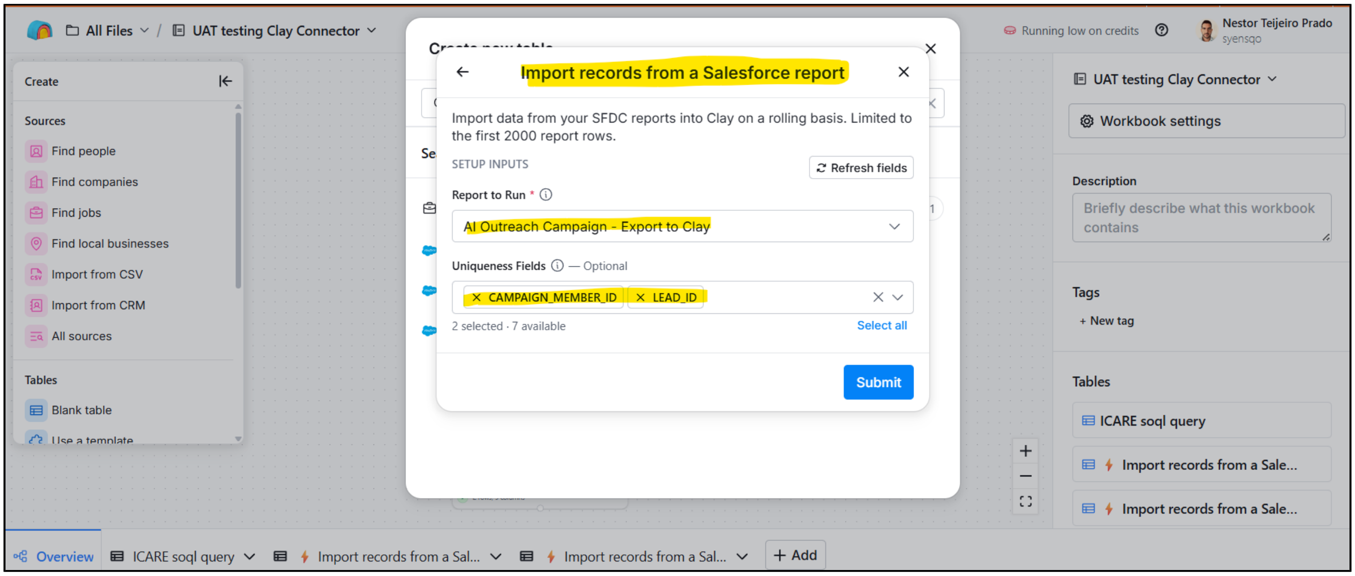
Using the Cold Lead Report

Stage 2 — Export Campaign Members to Clay

Once the audience is selected, records move into Clay. Clay is used to import the campaign data, check record quality, enrich missing fields, standardise company and contact information, classify the record into the correct segment or vertical, and prepare each row for messaging and downstream write-back.

Use only the approved 'SFDC Campaign Member Export for Clay Import' report. This report always includes CampaignMemberId and LeadId as stable mapping keys — critical to avoid writeback mismatches.

1. Go to Reports in Salesforce and search for SFDC Campaign Member Export for Clay Import.
2. Open the report and apply the Campaign Name filter to scope it to your current campaign.
3. Confirm the report includes CampaignMemberId and LeadId columns — do not export if either is missing.
4. Save the report.
5. Go to Clay, open the table, click Import from SalesForce Report.
6. Choose the correct credentials for the instance you are using (iCare or Core).
7. Select the report and hit Submit.
8. Verify row count in Clay matches Campaign Member count in Salesforce before proceeding.



Importing Records to Clay

Video Recording - Importing Records to Clay

Stage 3 — Data QA, enrichment, and segmentation in Clay - DEMAND7 MARCOM TO HELP DETAIL

Clay runs enrichment against the imported lead list — adding Company Description, Industry signals, and other approved fields. Enrichment outputs are staged for writeback. MARCOM must confirm enrichment quality before proceeding.

- Typical pre-checks: missing names, missing company, generic inboxes, duplicates, invalid formats, and records that should be excluded rather than enriched.
- Typical enrichment outputs: company description, industry, role or title information, geography, segmentation flags, and campaign logic fields.
- Typical business outcome: records become more usable for personalisation, routing, and reporting.

After Clay enrichment is complete, the following Salesforce fields are eligible for writeback. Only these approved fields should be updated, no other Lead or Campaign Member fields should be modified during this stag

Field label	API name	Object	Description	Notes
Clay company description	`clay_company_description__c`	Lead	AI-generated summary of the company's vertical industry and what they do	Populated from Clay's summary column during enrichment
External hard bounce	`clay_external_hard_bounce__c`	Lead	Flags whether the email address was found unreachable during enrichment	Setting this to `TRUE` also sets the overall hard bounce field to `TRUE`

Stage 4 — Messaging preparation and launch readiness DEMAND7 MARCOM TO HELP DETAIL

After the data is ready, the campaign message can be prepared. The AI layer uses approved prompts and business inputs to create personalised messages. Human review is essential before launch. This check should confirm the tone, relevance, factual accuracy, and whether the message feels appropriate for the target audience. Checks

- Tone of voice, clarity, brand fit, product references, and whether the CTA is suitable.
- Field population, prompt behaviour, message completeness, sender routing, and launch settings.
- What should be ready before sending: warmed sending infrastructure, throttle rules, time-zone settings, stop rules for replies and bounces, and final business sign-off.

Minimum launch checklist
• Audience approved and suppressed correctly • Message approved • Sending setup validated • Reply routing and follow-up owner agreed • CRM write-back fields understood

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Stage 5 — Launch outreach via Smartlead (DEMAND7 MARCOM TO DETAIL)

Campaigns should run in controlled waves, not as a single uncontrolled push. During launch, the team monitors send progress, opens, bounces, unsubscribes, early replies, and any signs of deliverability issues. A record that replies, unsubscribes, or hard-bounces should not continue through the sequence.

1. In Clay, open the **Smartlead sync** action column and confirm the target Smartlead campaign is mapped correctly.
2. Click **Push to Smartlead** — Clay will transfer the enriched audience to the Smartlead campaign.
3. In Smartlead, open the campaign and navigate to **Leads** — verify the imported count matches Clay's export count.
4. Open **Sequences** and confirm the correct approved template is attached. Do not use unapproved or experimental templates.
5. Check sender identity: confirm the sending profile uses either a **virtual agent disclosure** or an **approved real-person sender** name per the AI identity guidelines.
6. Review sending schedule and daily volume limits — refer to the infrastructure blueprint for limits per GBU.
7. Click **Launch** to activate the campaign. Monitor the first 30 minutes for bounce or error spikes.

Stage 6 — Reply handling, triage, and Salesforce write-back DEMAND7 MARCOM TO DETAIL HOW THE WRITE BACK AUTOMATION WILL WORK, ADHOC, SCHEDULED?)

Purpose:

This is the stage where outbound campaign activity becomes actionable. Once emails are live, replies and delivery signals need to be reviewed, classified, and written back into Salesforce so that the right follow-up can happen quickly and reporting stays accurate.

At a minimum, the process should distinguish:

Signal	Typical meaning	Main action	Write-back target
POSITIVE	Interested, asks for a call, asks for material	Route quickly to Sales or the agreed owner	Campaign Member

NEUTRAL	Acknowledgement, low intent, needs review	Review and decide next action	Campaign Member
NEGATIVE	Does not want contact	Stop outreach and mark appropriately	Campaign Member
OOO	No immediate reply, but may contain useful info	Review for new contact or follow-up timing	Campaign Member
Unsubscribe	Not interested in email communications	Update Lead to Unsubscribed	Lead Note

How the process works

- Inbound replies are captured in **Smartlead Master Inbox**
- Replies are classified in **Clay**
- Core reply outcomes are written back to **Salesforce Campaign Member**
- Bounce and unsubscribe outcomes are written back to **Salesforce Lead**

Write-back logic

1. Reply write-back

Reply outcomes should update the **Campaign Member** record:

- Status = Responded
  Reply Classification: the captured value (Positive, Neutral, etc.

And **Lead** record:

- SLV36_Pardot_Question_Asked__c = Email reply content

Business rule:
The Campaign Member field Has Replied is set to TRUE automatically on first response and is set-once.

2. Bounce and unsubscribe write-back

Bounce and unsubscribe outcomes should update the **Lead record** through a dedicated Clay tab.

That tab should contain:

- Lead ID
- Campaign Member ID
- other identifier fields as needed
- update type = Hardbounce or Unsbuscribed.
- clay_external_hard_bounce__c = TRUE or FALSE
- HasOptedOutOfEmail = TRUE or FALSE

This allows Clay to update the correct Lead with the correct status.

Proposed operating model

To be confirmed with Demand7 and Marcom: The team still needs to define whether this write-back will run:

- ad hoc
- scheduled
- or fully automated

Monitoring and control

Even if the core flow is automated, the team should still monitor it during active campaigns:

- Review Smartlead Master Inbox daily
  Spot-check reply classification in Clay
  Correct any misclassified reply before the next sync
  Monitor hard bounce and unsubscribe updates

Salesforce fields in scope

Write-back type	Salesforce Object	Field	Value / Logic
Reply write-back	Campaign Member	Status	Responded
Reply write-back	Campaign Member	Reply Classification	Captured value, for example Positive, Neutral, Negative
Reply write-back	Campaign Member	Has Replied	Set automatically to TRUE on first response; set-once logic
Reply write-back	Lead	SLV36_Pardot_Question_Asked__c	Email reply content
Bounce / unsubscribe write-back	Lead	clay_external_hard_bounce__c	TRUE or FALSE

Bounce / unsubscribe write-back	Lead	HasOptedOutOfEmail	TRUE or FALSE
Enrichment write-back	Lead	Clay Company Description	Captured / enriched value

Open point

Demand7 and Marcom to define the final write-back automation approach and sync cadence.

SalesForce Side
For the Salesforce side, the process should update the agreed business fields only. That mainly means Lead-level fields such as Clay Company Description, Industry where applicable, hard bounce or unsubscribe flags, and Campaign Member fields such as Has Replied and Reply Classification.

Stage 7 — Sales follow-up, reporting, and continuous improvement

The value of the campaign depends on what happens next. Positive replies should move into a follow-up process with a clear owner and an agreed response time. Reporting should then show both performance and trust signals, not just volume.

- Sales follow-up expectation: interested replies should be contacted quickly, ideally within 1 to 2 business days.
- Reporting view: campaign volume, reply rate, positive replies, unsubscribes, bounce rate, opportunity pipeline.
- Improvement loop: after each wave, review what worked, what needs tightening, and what should change before the next launch.