



Module 9: Creating Account and Lead Lists



Required: Sales Navigator License. If you don't have Sales Navigator, contact [Morgan](#) for a free trial. It is not necessary to use to run any of the outbound campaigns, but it is an invaluable tool for organization, data, and intent triggers.

1. Separate Your Total Market into Narrow Account Lists

We've evaluated many sellers and sales teams using social. This is a fundamental truth:

- Poor performers only use 4 filters on average to construct their account list
- High performers use 8-12+ filters on average to construct their account list

Narrow account lists help you win.

TAM vs. Account Lists

We don't recommend saving your entire total addressable market (TAM) as an account list. Chances are, you are assigned a geography or an industry ICP. It's very tempting to construct a TAM account list, right? **Don't.** You need to be more specific in your targeting.

Think of it this way: **you're shooting for a goldilocks zone of qualification.** There are accounts in your TAM that are just too big to go after. There are also accounts that might be too small, growing too slow, downsizing, or don't have the right staff.

If TAM is the biggest universe of accounts you *could* sell to, you want to make sure your Account Lists inside Sales Navigator are much smaller. Instead, you need to qualify your TAM.

Qualifying Your TAM

<https://share.descript.com/view/ea23K2k8F0N>

Qualifying accounts in your TAM use standard filters:

- Headcount
- Industry
- Growth Metrics (% growth overall or % growth in a department)
- Adding or losing headcount
- Geography
- Job titles or job descriptions

These filters represent a subset of your total TAM that are **better targets** than just a standard company. The reason this upfront work is so important is... you can't just blast out LinkedIn DMs on an automated sequence! You'll burn your entire TAM. So you need to focus your efforts on a smaller subset of accounts who meet that qualification.

How do you know which filters are the right filters to use?

- **Win/loss analysis.** Look at the last 10 deals your company won, and the last 10 they lost. What do the deals that are closed-won share in common? The commonalities likely include headcount size, a certain decisionmaker title, a certain pain point. If you can't access CRM data, look at case studies on your website. What are the commonalities of those case studies?

- **ICP or persona knowledge.** From preparing for your outbound campaign, you likely have some deeper knowledge of your ICP or persona. This includes technographics, firmographics, and other data you used to qualify the account. You'll want to make sure your accounts have these characteristics.
- **Industry context or industry knowledge.** Is it better to sell into a growing company or a downsizing company for your product? Where is the pain more evident in your industry for the product you solve? What does your company believe is happening in the industry and presents the biggest opportunity? Again from preparing for your outbound campaign, you likely have some deeper knowledge about what's going on in your industry.

Sales Navigator offers you these filters to create account lists. Remember, you shouldn't just be filtering by a few of these. Try to filter by multiple different headcount sizes, revenue numbers, headcount growth, industries, etc.

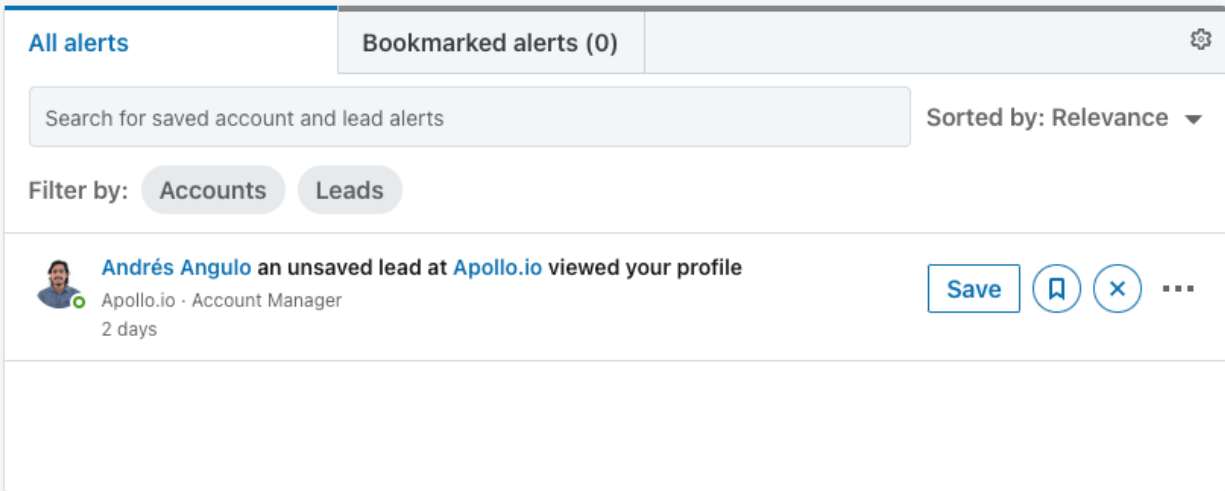
Company attributes		Spotlights	
Annual revenue	+	Job opportunities	+
Company headcount	+	Recent activities	+
Company headcount growth	+	Workflow	
Headquarters location	+	Companies in CRM	+
Industry	+	To enable filter, upgrade contract	
Number of followers	+	Saved accounts	+
Department headcount	+		
Department headcount growth	+		
Fortune	+		
Technologies used	+		

2. Create Prioritized Account Lists

<https://share.descript.com/view/kkdsAWb1rWz>

Now that you have your Qualified TAM Account List with all of your basic filters, it's time to prioritize the list and break it out into separate account lists.

First off - **why?** As stated in the above video, it's because Sales Navigator offers you native intent data. It looks like this:



Apollo.io is a company saved in one of our account lists. So we're now aware that the outbound campaign could be starting to gain traction inside this one account. Do you also see why your profile is so important?? Everything comes back to the credibility of your profile.

Prioritizing your Qualified TAM Account List allows you to identify which companies are the best match for your outreach first. By breaking out priority accounts, you can keep tabs on whether you're gaining traction within that account. It's also just... easier to keep track of, you know?

Creating Lists by Trigger

If you only had one big list, we would call this activity **prioritizing your list**. Which accounts do you reach out to first? Why them? Why now?

<https://share.descript.com/view/tWEgyQ5lkNx>

The central question you should be asking:

| Why should I be reaching out to them today vs. 60 days from now?

The answer to those questions, as explained in the video, comes from becoming a detective and identifying the specific triggers that demonstrate **today is a good time for outreach!**

▼ Example Triggers (Table of Ideas)

Full credit to [Jesse Oulette](#) for this wonderful list. We could add a couple but honestly... this is a great starting point. Confused about how to use this? Watch the video above.

Expansion / Relocation	New job / position for a current contact
Increase / Decrease in Customer Base	Dissatisfaction with Current Vendor
Increase in Hiring Velocity	Positive / Negative Press Coverage
Creation of New Job Title	Increase in positive / negative employee reviews
Increase in Business Expenses	Increase in positive / negative reviews on G2
Competitor Launched a New Product	New website / major website changes
New Executive	Lawsuits
Merger/Acquisition	Website security issues / prospect website issues
Layoffs	Increase in demand for prospect's product
Change in Management Strategy/Restructuring	Selling Assets / cutting losses
Shift in Sales Channel (Inbound vs. Outbound)	Company facing piracy issues
Increase/Decrease in Marketing Budget	Creation of new job title
Entrance into New Markets	Bad quarter
Change in Marketing Channel	Good quarter
Funding Rounds	Increase in software expenses

Major Customer Announcement	Change in web traffic
New Product/Service Announcement	Q&A threads related to prospect questions
Major Industry Development	New technology trend
New Legislation	Event Announcements
Awards/Recognition	Change in Marketing Agency
Analyst Report	New Tool Adoption

Think of creating a few different account lists:

1. Urgent, hair on fire accounts that need my help ASAP
2. Accounts I need to warm-up because they're good targets but I'm unsure if the timing is right
3. Everyone else

You should create these as **separate** account lists inside Sales Navigator for easier use of the platform, but the principle is the same! So you'll end up having four account lists:

- Account List #1: Qualified TAM
- Account List #2: Urgent outreach based on symptoms
- Account List #3: Warm-up accounts
- Account List #4: Interesting accounts, but not urgent

As you continue to use the platform, you'll get more comfortable with moving accounts between lists and understanding how this organization will help you as you run more comprehensive outbound.

3. Explore Leads by Activity

We gotta be honest: **we don't like saving leads in Sales Navigator.** We'll outline the use cases in #4, but it's actually not all that useful if you're using our plays.

The problem is that Sales Navigator will notify you about everything that lead is up to, and not all of that data is useful.

[DT SCREENSHOT OF NOTIFICATIONS]

Plus, the notifications on content posting are usually delayed 18-24 hours after they actually post so if you're trying for early engagement, it's not all that useful.

Instead, we recommend using Lead Searches by account list.

Lead

Account

< Collapse

0 filters applied

Clear all

📌 Pin filters

Role

Function	+
Job title	+
Seniority level	+
Years in current company	+
Years in current position	+

Include "\$1-\$10M High Growth (50%+)" in Account lists filter

Groups

+

First Name

+

Last Name

+

Profile language

+

TeamLink connections of

+

School

+

Spotlights

Activities and shared experiences 📌	+
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Posted Content

Keyword in articles	+
---------------------	---

Workflow

Lead lists 📌	+
People in CRM 📌	+
To enable filter, upgrade contract	
Account lists	—
<input type="text" value="Search for custom account lists"/>	
All account lists	
\$1-\$10M High Growth (50...	Include Exclude
1-15% Growth, 11-50, \$1M-...	Include Exclude
<\$2.5M 11-50 <100 Sales 5...	Include Exclude
Content Power Hour	Include Exclude
People you interacted with	+
Saved leads and accounts	+

On a lead search, you can include leads by account list.

See where we're going with this? 🤔

Then, add a **Spotlight filter of “Posted on linkedin in 30 days.”**

LeadAccount

< Collapse

1 filter appliedClear allPin filters

Past Company+	Industry +
Company type+	Years of experience +
Company headquarters+	Connections of+
	Groups+
	First Name+
	Last Name+
	Profile language+
	TeamLink connections of+
	School+

Role

Function+

Job title+

Seniority level+

Years in current company+

Years in current position+

Spotlights

Activities and shared experiences +

Changed jobs in last 90 days 7.5K+

Mentioned in news in last 30 days 36

Posted on linkedin in 30 days 13K+

Have shared experiences with you 99

Following your company 0

Workflow

Lead lists +

People in CRM +
To enable filter, upgrade contract

Account lists
\$1-\$10M High Growth (50%+) | X +

People you interacted with +

When you're using other lead filters by your ICP persona, you can whittle down to a fairly small number of leads that you can start engaging with based on their activity on LinkedIn (this will become important on our outbound plays).

▼ Example Lead Search for 71 Targeted ICPs, Active on LinkedIn

In this search, I've filtered leads by a Qualified TAM Account List. I've looked for leads inside Sales + Business Development who hold the displayed titles. And those who have posted on LinkedIn in the past 30 days. **Results? 71 leads.**

Role	Groups +
Function Sales X Business Development X +	First Name +
Job title "Director of Sales" X "Head of Sales" X "Vice President of Sales" X +	Last Name +
Seniority level +	Profile language +
Years in current company +	TeamLink connections of +
Years in current position +	School +
Spotlights	Workflow
Activities and shared experiences 🚩 Posted on linkedin in 30 days X +	Lead lists 🚩 +
	People in CRM 🚩 + To enable filter, upgrade contract
	Account lists <\$2.5M 11-50 <100 Sales 5% growth ... X +

This is why constructing prioritized lists, based on triggers, can help narrow down your field of vision even further.

These leads are actively posting, active on the platform. I can now run a variety of our outbound plays with these leads.

4. Create Lead Lists as Needed

Sometimes it is important to create lead lists. Remember – if your lead works at an account, you will get notified that they visited your profile whether or not you saved the lead, **as long as you saved the account.**

Saving leads has a few obvious benefits:

- Organize lead lists and conversation pathways
- Create lead lists of shared personas (all CFOs, all Directors of Sales, etc. across qualified TAM accounts) that allow streamlined follow-up and engagement
- Follow key leads with intent data triggers

We don't have strong advice about creating lead lists, as you'll see in the following modules. It only helps organize your information — it doesn't help you run outbound much more efficiently.



Enough prep, amiright? Let's dive into running outbound plays.

Next:



Module 10: Influencer Comment Play.