IDEA TO INVOICE · 11

Get the Conversation

You have visibility. Now you need actual conversations with people who might buy. Cold outreach, LinkedIn without the LinkedIn nonsense, and a one-person CRM that does not collapse under its own weight.

AUTHOR
Ted Milton
Founder, Expedient AI

EDITION
11 of 12

FORMAT
Field guide · PDF
10 pages

READ ME FIRST

Before you start

This is the guide for the bit after "people are starting to notice". It is the bit nobody enjoys.

You have a product. People are finding it. Your email list has subscribers and your website has visitors. None of them are buying. The reason is rarely that your product is wrong. The reason is that nobody has had an actual conversation with you yet. This guide is the manual for that conversation: how to start it, how to keep it going, and how to remember who you have spoken to without your spreadsheet turning into a wall of names.

This is for you if

You have shipped a product or service and at least one person has paid for it.

You have a website, a list, a profile, or some combination of the three, and they are producing nothing yet.

You are willing to write emails to strangers and be ignored by most of them.

You can hold a fifteen-minute call without freezing or overselling.

You would rather talk to fifty real prospects than post content into the void for another month.

This is not for you if

You do not yet have something to sell. Editions 08 and 09 are for that.

You are looking for a sales script that closes on the first call. There is one, and it is called being rude. Don't.

You will not pick up the phone or join a video call. Some conversations need to be synchronous.

You want a tool that sends a thousand messages a day on your behalf. That tool will get your account banned. See Chapter 3.

You need a sales hire. That is Edition 12.

> The honest summary: your first ten customers are sold manually. Your next hundred are sold with a mix of inbound and manual. Your thousandth is sold by a system. You are at step one. The tools in this guide will not feel efficient. They will feel like work. That is correct.

WHAT IS IN HERE

Contents

Four chapters, one checklist, ten pages. Read in order or skip to the bit on fire.

How to use this guide

Read the chapter that matches the bit you are stuck on. Most readers get stuck on Chapter 2 — the actual sending of the first email — and that is the chapter that matters. The tools listed cost £0 in total, but only if you already have a free email account and a free LinkedIn profile, which you do.

Tools used in this guide

Apollo.io free tier for prospect lists and verified emails. LinkedIn (free) for the profile work. Notion or a spreadsheet for the CRM in Chapter 5. Mailtrack free for knowing whether your email was opened. Total monthly cost: £0, so long as you stay inside the free tiers.

CHAPTER 1

Your first 10 customers won't come from a website

Your website is the place people go when they already know who you are. Before that, you go to them.

The hardest truth for new businesses: the website, the social presence, the SEO work, the email list — none of these, on their own, will produce your first ten paying customers. They are the destination. You have not built the route yet. The route is built by talking to people directly, one at a time, in messages and calls that are obviously about them and their problem. This is normal. It is the same for every solo business. Anyone telling you otherwise is selling a course.

Why first sales are manual

Five reasons your first ten customers will not arrive through any automated channel:

- You have no audience yet, so no algorithm has indexed you.
- No one is searching for your brand name, because it does not yet exist in their head.
- Your SEO has not had time to compound. Real SEO is a six to twelve month project.
- Paid ads require budget. This series assumes £0.
- The customer who buys first is buying the founder, not the product. They want to talk to a person before they hand over money.

Direct versus inbound

Direct is a message to a named prospect. Inbound is a stranger finding you and reaching out. The math for the first ten customers is simple: outbound to fifty people, expect five to reply, expect two to take a call, expect one to buy. That is a 2 per cent close from cold. It is also entirely sufficient for the first ten.

Inbound will come later, after the content work in Edition 10 has had six months to compound. For now, the work is named lists, named messages, and named follow-ups. Boring, slow, and the only thing that works.

Where to find the names

- **Apollo.io free tier.** Filter by job title, company size, industry, location. Export fifty names with verified emails. Free tier caps credits per month; fifty a week is sustainable.
- **LinkedIn search.** Filter by role and geography. Look for people whose posts indicate the problem you solve. Send connection requests first, message second.
- **Your existing network.** Past colleagues, friends of friends, the people you met at one event last year. The warm intro still converts at three to five times the rate of cold.
- **One event.** Attend one in-person or online event where your customers are. The conversations you have in the hallway convert better than any email you will send that month.

> Build a list of fifty names before you write a single email. The discipline is in the list. Without a list you will send one message, hear nothing, and conclude that outreach doesn't work. It doesn't work at one. It works at fifty.

CHAPTER 2

Cold outreach that isn't spam

The difference between outreach and spam is consent, relevance, and the size of the list.

Spam is sent to thousands of strangers who never opted in, with a message that could have been sent to anyone. Cold outreach is sent to a short list of named individuals who match your ideal customer, with a message that is clearly about them and their problem. The first is illegal under PECR if you are emailing UK contacts. The second is work that almost nobody does well. This chapter is for doing the second one well.

The three-sentence email

Three sentences. No more. The format works because it respects the reader's time and gives them a clear next step.

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Subject: [specific thing about them or their company] Hi [first name], [Sentence 1 – why you are writing, specific to them, not to your product] [Sentence 2 – one specific result you have delivered for someone like them, with a number] [Sentence 3 – what you would like to happen next, low commitment: a fifteen-minute call, a reply, a no] [Your name] [One-line role description]
```

That is the whole template. If your draft runs longer than three sentences in the body, it is because you have not done the work in sentence one yet.

AI-personalised at small scale

The temptation with AI is to send a thousand personalised messages a day. Do not do this. The deliverability cost is real, the response rate collapses below a certain threshold, and the messages start to read like a thousand personalised messages a day. The right use of AI is at the scale of twenty to fifty messages a week.

Use the model to draft sentence one based on the prospect's LinkedIn profile, their company's recent news, or a specific post they wrote. Read it. Edit it. Then write sentence two yourself, because that one is about you and a specific result you have delivered. Sentence three is the same for everyone.

What to never do

- ✓ Attach a PDF pitch deck to a first email. Nobody opens it.
- ✓ Use the recipient's first name with an exclamation mark. Ever.
- ✓ Ask for a thirty-minute call in the first message. Fifteen is the ceiling.
- ✓ Follow up more than twice without a reply. After that, you are the spam.
- ✓ Copy and paste the same email to fifty people. The first sentence will tell.
- ✓ Send from a no-reply address. Send from your name. People reply to people.
- ✓ Pretend to be offering value when you are asking for the sale. Both work; lying about which one is doing is what gets you blocked.

> The honest truth: a 2 per cent reply rate is good. Twenty-five replies from a hundred emails is a banner week. If your reply rate is below 1 per cent, the problem is sentence one. Rewrite it. If it is above 5 per cent, you are not reaching out far enough.

CHAPTER 2 · CONTINUED

The first week of outreach

A worked example, a follow-up sequence, and the one metric that matters.

Below is a worked example of the three-sentence email, the follow-up sequence you should run alongside it, and the single number that tells you whether the outreach is working. Print the example, edit it for your business, and use it as the template for week one.

A worked example

BEFORE — THE AI-SHAPED DRAFT NOBODY REPLIES TO

Subject: Quick question

Hi Sarah,

I hope this finds you well. I'm reaching out because I noticed your company is doing really interesting things in the market, and I thought there might be a great opportunity for us to explore a potential synergy. I've helped similar companies fix the bottleneck in their week and I'm confident I can help you too. Would you be open to a quick chat?

AFTER — THE THREE-SENTENCE VERSION

Subject: The 14 hours a week your invoicing is costing you

Hi Sarah,

I saw your post last week about the team growing and the admin piling up. I help twelve-person agencies cut their invoicing from a day a week to an hour, mostly by changing three small things. Worth a fifteen-minute call to see if any of them would help you?

The first one is generic, breathless, and asks for an undefined thing. The second names the problem, names a specific result with a number, and asks for fifteen minutes. The second will get replies. The first will not.

Follow-up sequence

1. **Day 0.** Send the three-sentence email.
2. **Day 3.** If no reply, send a single follow-up that adds something new: a link to a relevant post, a one-sentence observation about their business, a question only they can answer.
3. **Day 7.** If still no reply, send the breakup email: "I will leave this here in case it becomes useful. Either way, best of luck with [specific thing they are doing]." This converts more replies than any other email in the sequence. People reply to close loops.
4. **Day 14.** Stop. Move on. The list is bigger than any single name on it.

The one metric that matters

Open rate is vanity. Reply rate is the metric. If your reply rate is below 1 per cent after twenty sends, the message is wrong. Rewrite sentence one. If your reply rate is between 1 and 3 per cent, the message is fine, the list is too narrow. Send more. If it is above 5 per cent, your list is too small or your targeting is too tight — broaden one notch and see what happens.

CHAPTER 3

LinkedIn without losing your mind

A usable profile, twenty connection requests a day, and a posting cadence you can sustain on a Tuesday evening.

For a B2B solo business, LinkedIn is still the highest-signal network. The problem is that the platform is full of advice that is either designed to be sold to recruiters or designed to be sold to you. The version below is the version for a one-person business that needs conversations, not impressions.

Profile optimisation with AI

Three sections of your profile matter. The rest is decoration.

- **Headline (220 characters).** Name your role, name the customer, name the outcome. Not "Founder at X". "I help twelve-person agencies cut their invoicing from a day to an hour".
- **About (2,600 characters).** First sentence states the problem. Second sentence states what you do about it. Third sentence names a specific result. The rest is supporting evidence and a clear "DM me" or "book a call" at the end.
- **Featured section.** Three links: one piece of writing, one piece of writing, one piece of writing. Not your homepage, not a sales page, not a deck. Writing.

Use AI to draft all three, then rewrite every sentence until you would not be embarrassed to say it in a meeting. The draft is for structure. The rewrite is for voice.

Connection requests that get accepted

The default "I'd like to add you to my professional network" message gets ignored. The personalised message gets accepted at three to five times the rate. The personalisation has to be visible in the first eight words.

> A CONNECTION REQUEST THAT GETS ACCEPTED
>
> Hi [name] — saw your post about [specific topic]. Curious how it landed with your team. Happy to connect.

That is the whole message. No pitch. No ask. The conversation happens after they accept.

Posting cadence

One post a week. Not one a day. The cadence you can sustain for a year beats the cadence you can sustain for a month. The post should be either an observation, a number, a contrarian take, or a short story about a customer. None of those four formats need a viral hook. They need a point of view.

> ON LINKEDIN AUTOMATION TOOLS
>
> Third-party tools that send connection requests, messages, or post on your behalf will get your account restricted. LinkedIn's terms of service explicitly prohibit most of what these tools do. Their detection has improved every year since 2022. The sequence is: tool works for a month, account is restricted, you spend a week begging support to lift it, the tool quietly signs you up again. The only safe use of automation on LinkedIn is scheduling your own posts in advance, with a tool you control and from a logged-in browser session you can see. Anything else is not worth the time you would save.

CHAPTER 4

A one-person CRM that doesn't collapse

You do not need a CRM. You need a list with names, dates, and a next action. Pick the tool that matches the list.

A CRM is a fancy word for "where I keep track of who I have spoken to and what I said". For a one-person business, that is a list with seven columns. The trap is buying a CRM before you need one, spending three weeks setting up automations, and never speaking to a customer again because you are too busy configuring pipelines. Below is the version that fits a one-person business at three different scales.

CRM decision

0–100
Spreadsheet or Notion. Free. The only fields you need are name, company, what they said, when you last spoke, and the next action. Do not add more.

100–500
Free CRM. Notion works. Folk (free tier) works. HubSpot free works. The trigger to switch is when you cannot remember who you last followed up with.

500+
Paid CRM. Attio, Pipedrive, or HubSpot Starter. You will know because you are losing track of conversations and missing follow-ups.

Spreadsheet versus free CRM

CONSIDERATION	SPREADSHEET / NOTION	FREE CRM
Setup time	15 minutes	1–3 hours
Reminders	None (you will forget)	Built-in follow-up reminders
Email logging	Manual copy-paste	Auto-logged if connected
Notes per contact	Unstructured cell	Structured timeline
Best at	Under 100 contacts, simple sales	100–500 contacts, multiple touches per week
Failure mode	You forget to update it	You spend more time configuring than selling

The honest test: if you have opened your CRM in the last seven days, it is working. If not, it is overhead.

When to move

Move from spreadsheet to free CRM the day you forget to follow up with a real prospect and lose the deal because of it. Not before. Move from free CRM to paid CRM the day you are losing more than one deal a month to follow-up gaps, or when a tool stops being able to do something the next tier does. Not before.

Free tools that work

- **Notion.** Free for personal use. Database view with checkboxes for "last contacted" and "next action" does the job for the first hundred.
- **Folk.** Free tier for up to one hundred contacts. Built for the one-person pipeline. Light, modern, hard to over-configure.
- **HubSpot free CRM.** Unlimited contacts. The interface is large. The reminders work. The reporting is more than you need at this scale.

READINESS CHECKLIST

Are you ready to reach out?

Work through this before you send a single email. If any answer is no, fix that bit first.

Most cold outreach fails for reasons that have nothing to do with the message. The product page does not load. The website does not say what the email said. The LinkedIn profile contradicts the pitch. The list is too small. The follow-up plan is missing. Below is the readiness list. Tick every box before you press send on the first email.

The basics

- ✓ I have a working product or service that at least one person has paid for.
- ✓ My website or landing page loads in under three seconds and says what I do in the first 200 words.
- ✓ My LinkedIn headline says what I do and for whom, not just my job title.
- ✓ I can name, in one sentence, the specific result I have delivered for a real customer.
- ✓ I can hold a fifteen-minute call about my work without freezing or overselling.

The list

- ✓ I have at least fifty named prospects with verified email addresses.
- ✓ Each prospect matches at least two of: role, industry, company size, geography, problem.
- ✓ My list lives somewhere I will actually look at it (Notion, spreadsheet, free CRM).
- ✓ I have decided what "reply" looks like (booked call, interested reply, referral to a colleague, polite no).

The message

- ✓ My subject line is specific to the recipient, not generic.
- ✓ The first sentence of the email is about them, not about me.
- ✓ The second sentence has a number, a name, or a specific result.
- ✓ The third sentence is a low-commitment ask: a reply, a call, a referral.
- ✓ I have read the email out loud. I have not stumbled. I have edited until I do not.

The follow-through

- ✓ I have a follow-up plan written down, not in my head.
- ✓ I know what I will say on day 3, day 7, and at the end of the sequence.
- ✓ I have blocked two hours a week on the calendar for outreach. The block is recurring.
- ✓ I have told one person what I am doing, so that the shame of skipping a week is real.
- ✓ I will measure reply rate, not open rate, and rewrite sentence one if it is below 1 per cent after twenty sends.

Tick twenty of twenty. Then send the first email. The twentieth will be easier than the first, and the hundredth will be easier than the twentieth. The list gets easier with every name on it.

ABOUT THIS GUIDE

Colophon

Everything you might want to know about where this came from and what to read next.

AUTHOR

Ted Milton, Founder, Expedient AI

An independent practitioner in Bristol writing field guides for one-person businesses that would rather be doing the work.

TOOLS USED

Apollo.io free tier for prospect lists. LinkedIn (free) for the profile and connection work. Notion or Folk free tier for the CRM. Mailtrack free for open tracking. Total monthly cost: £0 within free tiers.

EDITION

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A4, ten pages, one field guide per quarter. British English. No exclamation marks. No testimonials. Website contact only.

The Idea to Invoice series

01 — Where AI Actually Helps

02 — The 30-Day AI Pilot

03 — Your Data Your Rules

04 — Writing AI Instructions That Actually Work

05 — The AI Vendor Interrogation Kit

06 — Your First AI Employee

07 — Set Up Your Own AI Agent

08 — Is This Worth Doing?

09 — Build the Thing

10 — Get Found

11 — Get the Conversation (this guide)

12 — Close the Deal

> The next guide in the series is Edition 12 — Close the Deal. It is the last in the Idea to Invoice arc and covers pricing, proposals, the call itself, and what to do when the conversation goes quiet. Reading order: this guide, then that one.